# Up-A-Notch™ Sales Training System for Outside Salespeople

By Dave Kahle

Persuasive Presentations I

Facilitator's Guide

## *Congratulations, you are going to facilitate this training session.*

Your job includes these things:

- facilitating the group conversations
- supporting and encouraging each member
- managing the details of the program
- holding people accountable for doing their assignments.



It's important that each member of the group personally consider the material on the tape and do the exercises in this manual. Instead of "teaching," your job is to help them learn. That means ensuring that each participant completes the exercises, enters into the dialogue, and faithfully keeps to the learning procedures built into the program.

It's really not that difficult. Just follow our directions. As you complete each task, check the line in front of it.

> *Note: If you have more than eight participants, we recommend you split the group into two small groups with four or five participants in each and hold separate training sessions for each group. The exercises are designed for small groups, usually no more than seven people.*

### Here's how to do it…

**Prepare for the session:**

______Make sure you have a working video player and monitor, or as a less desirable option, an audio cassette player.

______Have an easel or white board available.

______Prepare one set of materials for each of the participants.

- ✓ Have one Participant Guide for each participant. If you need more, contact The DaCo Corporation at 800-331-1287 to order additional materials.

- ✓ Split up the "bubble pads" so that each participant has at least three sheets. Split up the "prescription pads" so that each participant has at least two sheets.

- ✓ Obtain the copies of the "Prescriptions" that were written at the end of the last meeting.

- ✓ Arrange the chairs in a comfortable, semi-circular pattern.

______Send a written invitation/reminder to each participant. Remind them to bring something to write with, and to hold their calls.

**<u>During the training session:</u>**

______Begin with a discussion of the progress the participants made on their previous prescriptions. Get last session's prescriptions then say this:

*"At each training session, we will all be making commitments for things we are going to do differently. In some cases, we may reconnect to something we already know we should be doing. In other cases it maybe something we haven't done before, regardless, making these commitments or writing "prescriptions", is a part of every session.*

*A part of every session is following up on the prescriptions we wrote in the previous training session. That is what we are going to do now. I am going to read each prescription and ask you how you are doing on that.*

*I will go first."*

______Now, read your prescriptions and explain in detail how well you have done at accomplishing it. If you noticed some positive results, make sure that you describe them and relate these results to the actions you took on your prescription. Remember to give a well thought out, honest, detailed report. The other participants will copy your modeling of how to report.

______Then proceed to ask each person to report. Say, *"(person's name), you said you were going to (read the prescription). Tell us what you did."*

When appropriate, also ask, *"What result of your actions did you see?"*

______Be sure to thank everyone who reported, and to positively encourage those who followed through on their prescriptions.

______Distribute the handouts. Allow them a few minutes to review the materials. Tell them the pages marked "Notes" at the top are to be completed while the tape is being played, and the pages marked "Exercises" are for after the tape is finished.

Say this:

*"Today's topic is "Persuasive Presentations-1." Take a couple of minutes to look through the materials. Note that the pages marked "Notes" at the top are to be completed while the tape is playing, and the pages marked "Exercises" should be completed afterward."*

______When everyone is ready, turn on the tape. Continue to view (listen to) the tape until it is finished.

**Following the end of the tape:**

______Immediately after the tape is finished, give everyone a few moments to complete their "Notes."

Say this:

*"Take a couple of minutes now and finish filling in the blanks on the 'Notes' exercise."*

The participants may want to discuss the notes or some aspect of the taped presentation. Allow them to do so.

_____***Exercise One: Preparing your presentation by profiling the customer.***

- ✓ Give everyone a few moments to read the directions.
- ✓ If the group is larger than five, then break it up into smaller groups of three or four people each. If not, work together on the exercise.
- ✓ Allow the groups five to ten minutes to complete the exercise.
- ✓ When everyone is finished, have each group share their profile with the larger group. If you have worked together as one group, then move on to exercise two.

_____***Exercise Two: Preparing your presentation.***

- ✓ Give everyone a few moments to read the directions.

- ✓ Keep them in the same groups as the last exercise. Now, give them five to fifteen minutes to work together and create their own presentation.
- ✓ When everyone is done, have each group share their thoughts as to how they have prepared the presentation. They don't need to actually deliver the presentation (that comes in the next session.) But they should share their thoughts and the ways in which they have prepared. Encourage people to make positive suggestions.
- ✓ When each group has finished, remind them to keep their work for the next session. You may want to collect it and keep it till the next program. The work they was done today will be the basis of the exercises in the next session.

_____***Exercise Three: Generating Ideas***

- ✓ Give everyone about five minutes to complete three of their yellow bubble pads.
- ✓ Then, once again, ask people to share their ideas. This exercise will help others understand how to record a "good idea," and will stimulate additional ideas.

  Say this:

  *"Now let's share some of these ideas. I'd like each person to share at least one. If you hear someone else's idea and that makes sense to you, feel free to record it as your own on one of your bubble sheets. You can have more than three. (Call on someone or go first yourself) ____________, what's one of your ideas?"*

- ✓ Continue in this way until everyone has had a chance to share at least one idea.
- ✓ If people are hesitant to share, or if they have no ideas, take a few extra moments to review the content of the tape by going through the "Notes" exercise. Review each major point, and ask people to comment on it.

  Say something like this…

  "*The first point he made was that ……………*"

  "Does that make sense to you?"

  "How could we use that idea in this organization?"

  "Any way that you might be able to use that?"

- ✓ *In this way, continue down through the "Notes" exercise, reviewing each point, and encouraging people to find "ideas" and write them down.*

_____***Exercise Four: Distilling the Best***

- ✓ Give everyone a few moments to complete it.
- ✓ Ask each person to share his or her ideas.

_____***Exercise Five: Precisely Prescribing***

- ✓ This time, ask each person to make a copy of his or her prescription, writing it on an additional Prescription pad. Ask each to write his/her name on the prescription, and turn it in to you.
- ✓ Mention that at the beginning of the next session, the group will review each of these prescriptions in order to hear what progress each person has made.

Say this:

*"At the beginning of the next session, we'll take a few minutes and find out what progress each person has made on his/her prescriptions. Be prepared to tell us what you did, and what results you saw. We'll be looking especially for success stories."*

______Now, confirm the time, date and place for the next session, and close this session.

______Fill out the evaluation form (next page) and fax it to 616-451-9412.

***Congratulations! You have just successfully facilitated this training session.***

# Evaluation

Please complete this form after the training session and fax it to 616-451-9412.

Lesson Title_______________________________________________
How many people attended: _________ Date of session: __________

Based on your discussion of the progress made on *last month's prescriptions*, which of these occurred? Check one in each column.

____ No one acted on their prescriptions.
____ A couple of people acted on their prescriptions.
____ Most attempted to complete their prescriptions.
____ Everyone acted on their prescriptions.
____ Everyone reported positive results.

____ There were no positive results.
____ A few people indicates some positive results.
____ Most reported positive results.

One such result was:

_______________________________________________________________________

Please place a check in the box for how you believe the majority of the people would respond.

| | Not at all | A little | Somewhat | A lot | A great deal |
|---|---|---|---|---|---|
| How practical & useful was the content? | | | | | |
| How practical & useful were the exercises? | | | | | |
| How easy was the program for you to facilitate? | | | | | |

What was the most valuable thing your people gained?

_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

What one thing would you suggest we change for next time?

_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

Do you have any suggestions for topics that we should test in the future? Please describe.

_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

Optional: Your Name ____________________________ Phone # _______________
Email ________________________________________

# Persuasive Presentations I

# Notes & Exercises

# Notes

Everything you've done so far has been designed to get you to this _(point)_. The relationship building, organization, preparation, information gathering – all these are _(means)_ to an _(end)_. You do them so that you can get to this place – _(presenting)_ your _(offer)_ to a _(receptive)_ customer.

There are _(two)_ important parts to this skill. The first is _(preparing)_ the presentation, and the second is _(delivering)_ it well.

Principle: Your _(offer)_ is always _(larger)_ than just the product or service or program that you are presenting.

By "Offer" I mean the sum _(total)_ of that which you are _(presenting)_.

Your customer doesn't just buy a product or service, he /she also considers:

- your company's _(strength)_ and experience
- your company's history in that particular _(account)_
- the _(likelihood)_ of your company being around to _(service)_ the sale
- the salespeople who represent your company
- the _(terms)_ – or how they pay for your offer
- how they buy and order it
- what sort of guarantees or _(warranties)_ comes with it
- the delivery time and method
- what sort of _(changes)_ will be required from _(them)_ to _(implement)_ it

- what sort of (promises) you have made to help them implement it
- how this product or service (impacts) (others) that they may have or that they may be considering.

Principle 2: Presentations are always about (two) subjects: your (offer) and your (customer). One of the most common mistakes that salespeople often make is this – they focus their presentation on their (offer) (exclusively) – forgetting to talk about the (customer).

Principle 3: The more you (involve) the customer, the more (effective) is your presentation.

Here's the overall strategy, expressed in a way designed to make it easy to remember: Effectively (match) your (offer) to your (customer). The key word here is (match)

You start with the beginning piece – your (deepest) and (clearest) understanding of the customer's (problems) and (objectives), the implications of those, and the (impact) those implications have on the (individuals) within the organization. Then you select which (features) and which (benefits) to describe.

So, on one hand you have your best (understanding) of the customer's (needs). On the other you have your most (sensitive) and thoughtful preparation, and then you have the process for bringing the two together. This whole thing can be called (matching).

Let's focus on preparing the content of your presentation. First, keep in mind that amount of _(time)_ and effort you spend _(preparing)_ for your presentation depends on how big the deal is. Your preparation could be as minor as taking a few moments in your car before a _(sales)_ call and _(skimming)_ over a sell sheet. Or, it could encompass several _(weeks)_ of intense _(preparation)_ with a team of people .

Step One. Describe your best understanding of the customer's objectives.

The place to start is a recap of what the customer _(wants)_.

When you adhere to this discipline, it keeps you _(focused)_ on what is most important part of your _(presentation)_, and prevents you for going off on tangents.

Step Two. Select the salient features of your product or service.

Because every customer is _(different)_, every _(presentation)_ should also be different.

Step Three. Prepare to communicate the features with _(detail)_ and _(power)_.

There is credibility and _(substance)_ in _(accurate)_ detail.

Another way to add power to your presentation is to prepare _(third)_-_(party)_ _(recommendations)_.

Step Four. Translate the features into specific _(benefits)_.

Remember, a good presentation is always about two subjects – your _(offer)_ and your _(customer)_. When you're describing a _(feature)_, you talk about it. What you're describing a _(benefit)_, you talk about your customer.

Step Five. Render those into descriptions of _(positive)_ emotions.

Step Six:  Gather your materials.

Finally, you need to _(practice)_.

If you have worked through these steps, you are now ready to deliver your presentation.

# Exercise One: Preparing Persuasive Presentations by Profiling Your Customer

Directions: The first step in preparing a persuasive presentation is to concentrate on knowing your customer. Use the form below as a mechanism to capture important information about your customer. Working in a small group or with a partner, fill out the form for an imaginary, though typical, customer. Make up the information to fill in the form, but do so as realistically as possible.

Customer Type: ________________________________ Position: ________________

Situation: ______________________________________________________________
_______________________________________________________________________
_______________________________________________________________________

Customer's objectives: _______________ _______________________________
_________________________________ _______________________________
_________________________________ _______________________________

Implications: ______________________ _______________________________
_________________________________ _______________________________
_________________________________ _______________________________

Feelings: __________________________ _______________________________
_________________________________ _______________________________
_________________________________ _______________________________

Behavioral Style: ________________________________________

Language Notes: ________________________________________

Buying Motivation: ______________________________________

# Exercise Two: Preparing a Presentation

Directions: Now, take the information from the previous exercise and use it to prepare a presentation. Select a product, service or program to present. Use all the tips and techniques discussed in the video to prepare a persuasive presentation of that offering to the customer you profiled. Use the form below to capture your thoughts.

Customer: ______________________________________________

Product/Service/Program: ___________________________________

Customer's Objectives:

____________________________________________________

____________________________________________________

____________________________________________________

1. What aspects of your offer is this customer concerned about, above and beyond the product/service/program? ______________________

____________________________________________________

____________________________________________________

____________________________________________________

2. Exactly how will you involve this customer? ____________________

____________________________________________________

____________________________________________________

____________________________________________________

3. How will you match your offer to your customer? _______________

____________________________________________________

____________________________________________________

**Your Customer's**

Problems/Objectives:

Implications:

Feelings:

**Your**

Features:

Benefits:

Feelings:



4. What materials will you need?

5. What will you ask your customer to do as a result of your presentation?

# Exercise Three: Generating Ideas

Use the bubble pads to write down at least three good ideas you gained from today's session. Remember the four criteria for a "good idea." We've illustrated a couple of samples for you.

*Remember, a good idea is one that*
* *focuses on the future*
* *focuses on action*
* *focuses on your behavior*
* *is a small step toward one of your learning goals.*

*Decide to invest a certain amount of time in self-improvement every month.*



*Use a specific process in order to learn more effectively.*

# Exercise Four: Distilling the Best

Select the one good idea from the previous exercise that you think is the best. To help you make that selection, ask yourself these questions:

1. Which of these ideas could make the fastest impact on my performance?
2. Which of these ideas would make the biggest impact on my performance?
3. Which of these ideas am I most passionate about?

Rewrite that idea here.

# Exercise Five: Precisely Prescribing

Turn the idea from the previous exercise into a Precise Prescription. Write that prescription on the Rx pad. We've done an example for you. Now, take your prescription and post it someplace where it will remind you to do it.

Rx (Precisely Prescribe)

*I will set aside two hours every week for personal improvement and keep a record of what I do in that time.*